# *REAL TIME COLLABORATION CONCEPT TESTING*

Ravi Raman
RTC Product Planning

Version 092404

MICROSOFT CONFIDENTIAL

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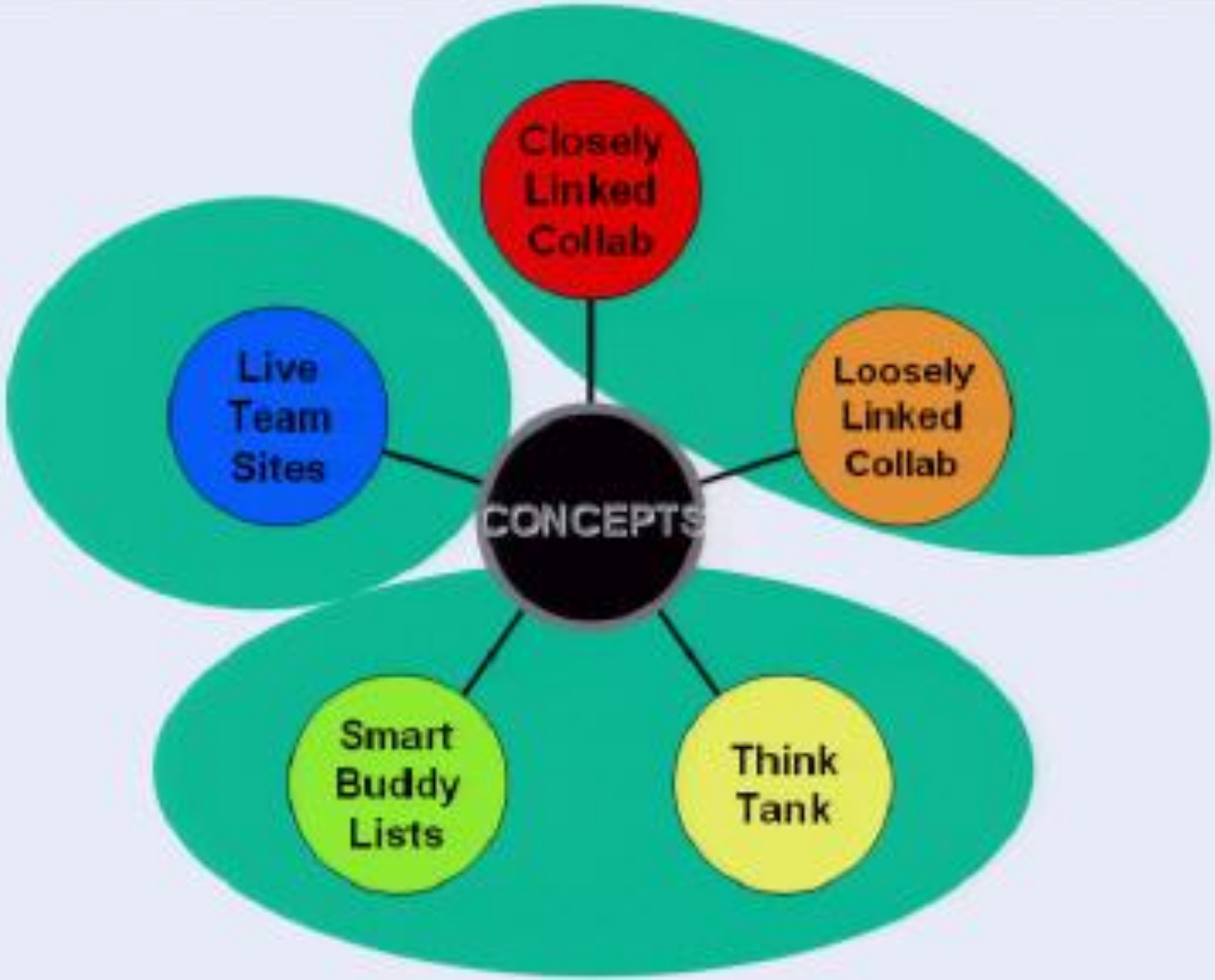
# *THANKS TO.....*

- Bernardo Caldas
- David Nichols
- Ed Simnett
- Feliz Montpellier
- Joe Fletcher
- John Licata
- Paul Haverstock
- Pavel Curtis
- Tom Pease
- Yong Rui
- Ying Wang
- Anuraag Tiwari

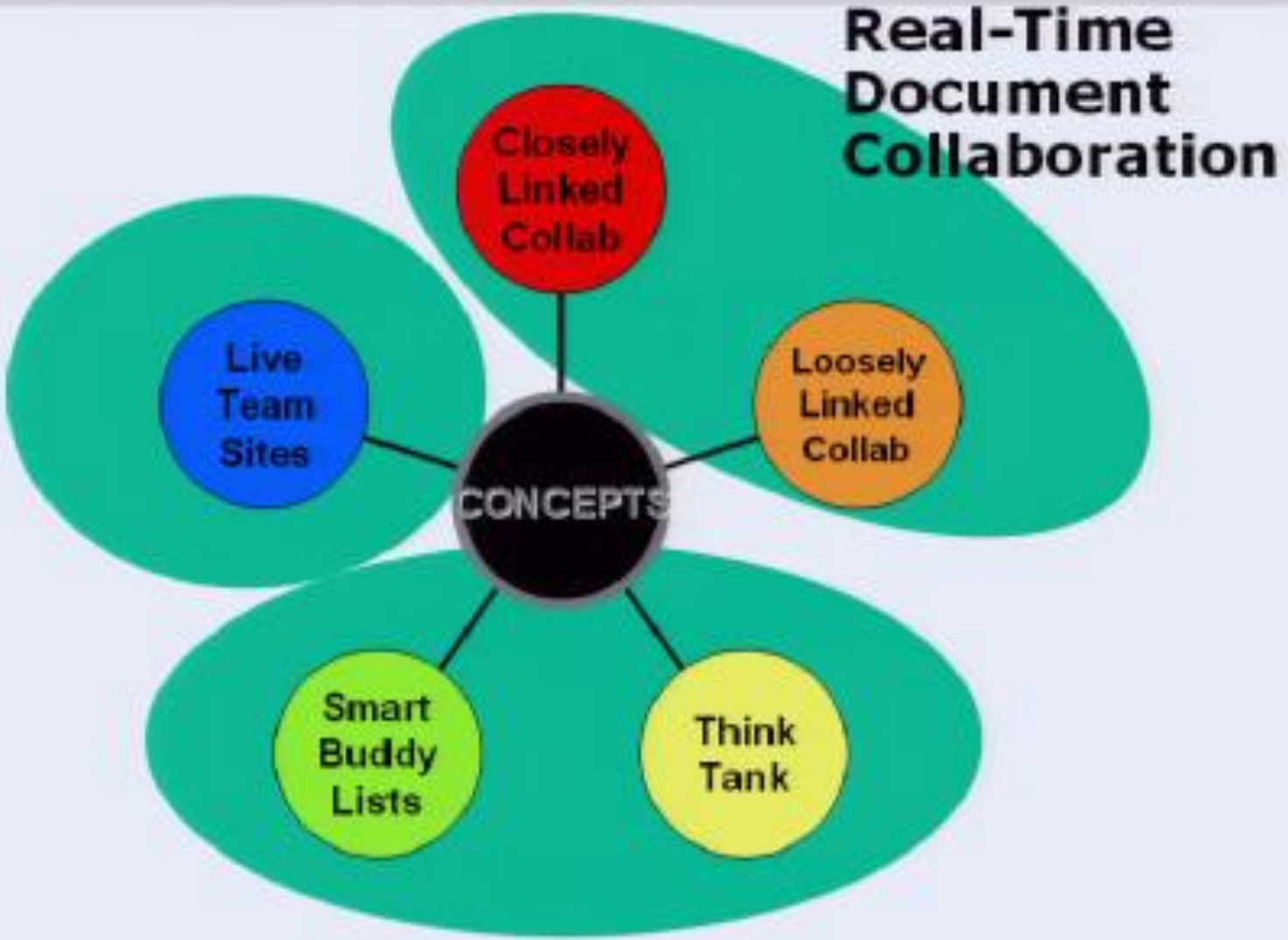
# WHY SHOULD WE CARE?



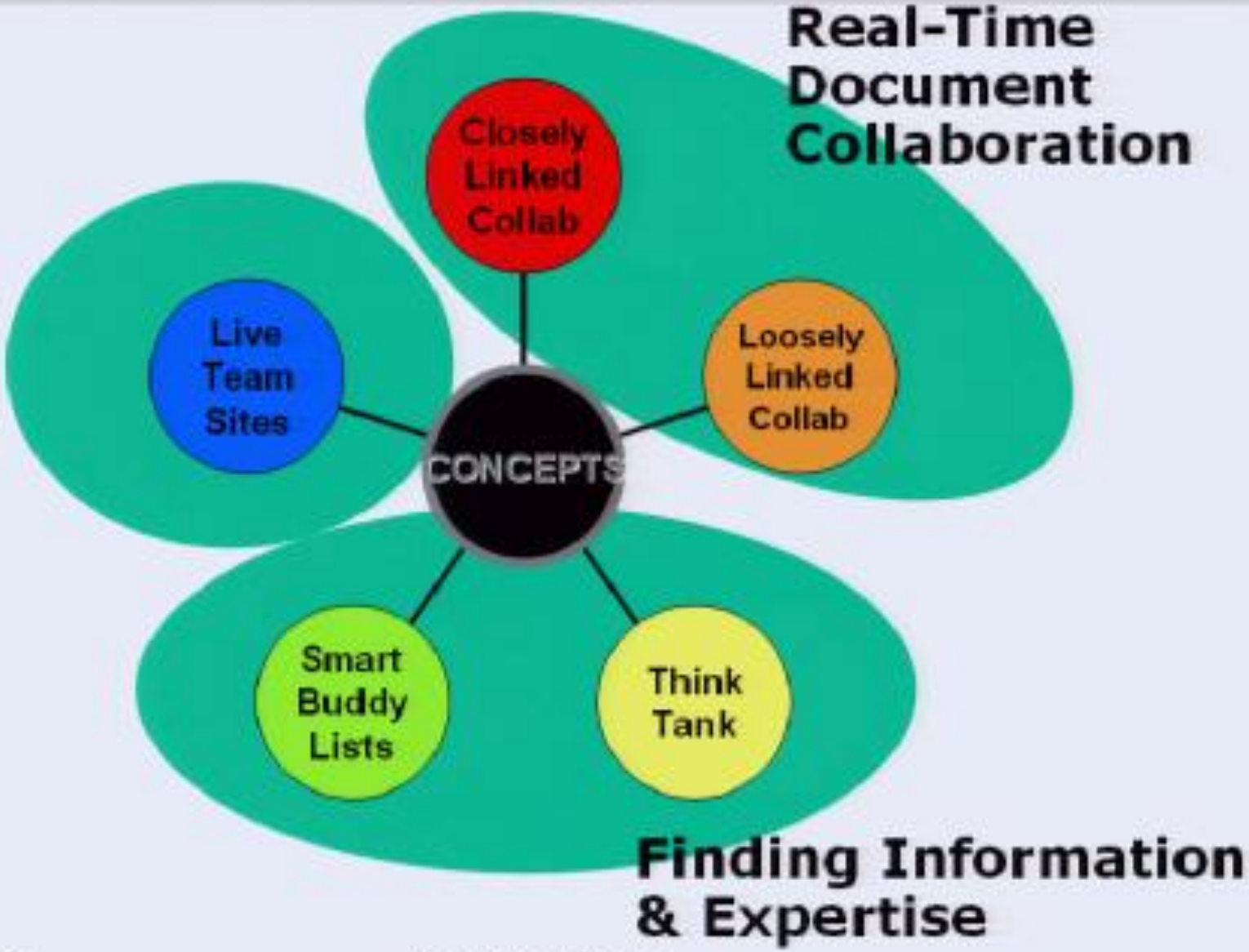
# CUSTOMER PROBLEMS AND POTENTIAL SOLUTIONS



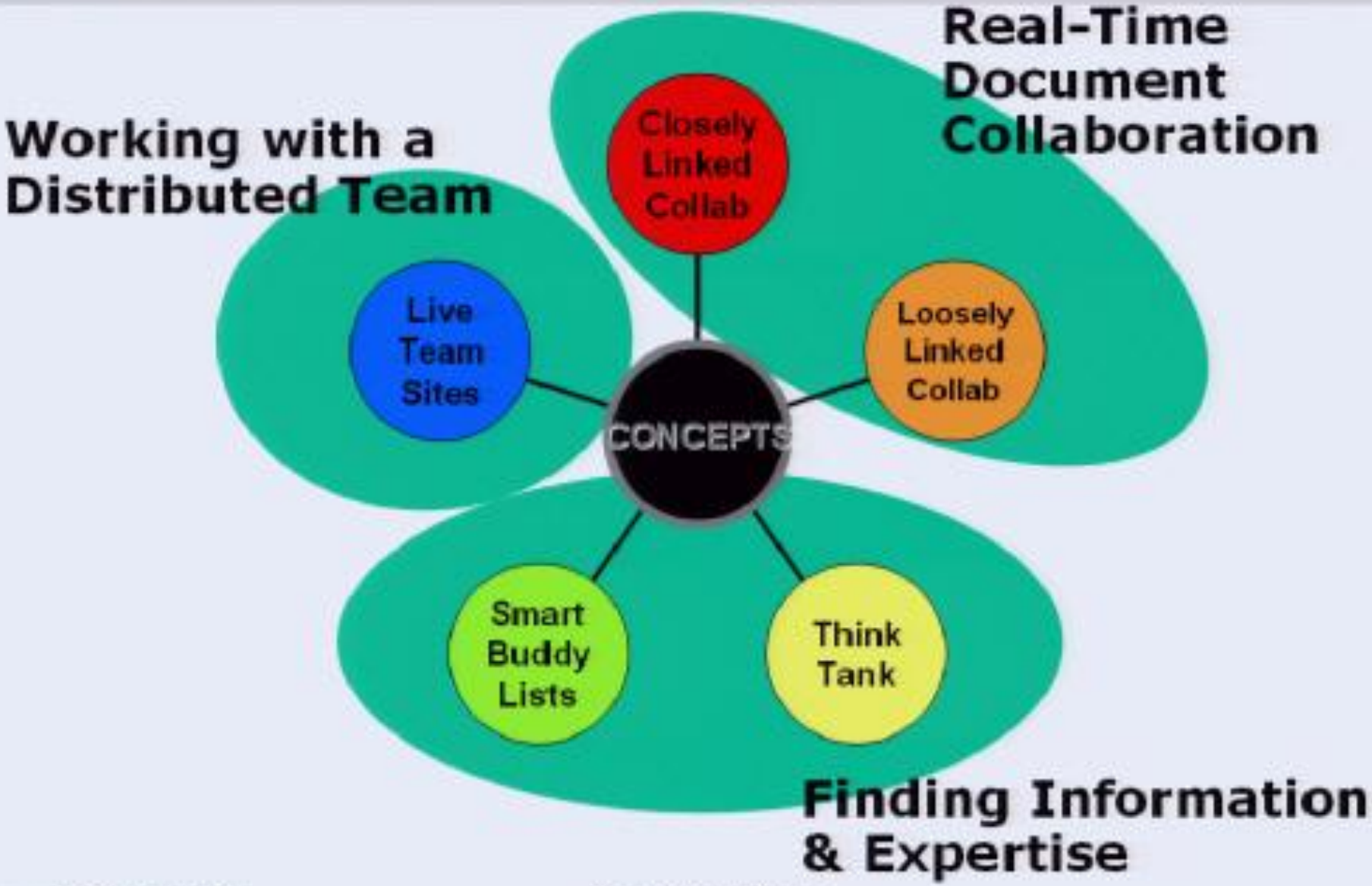
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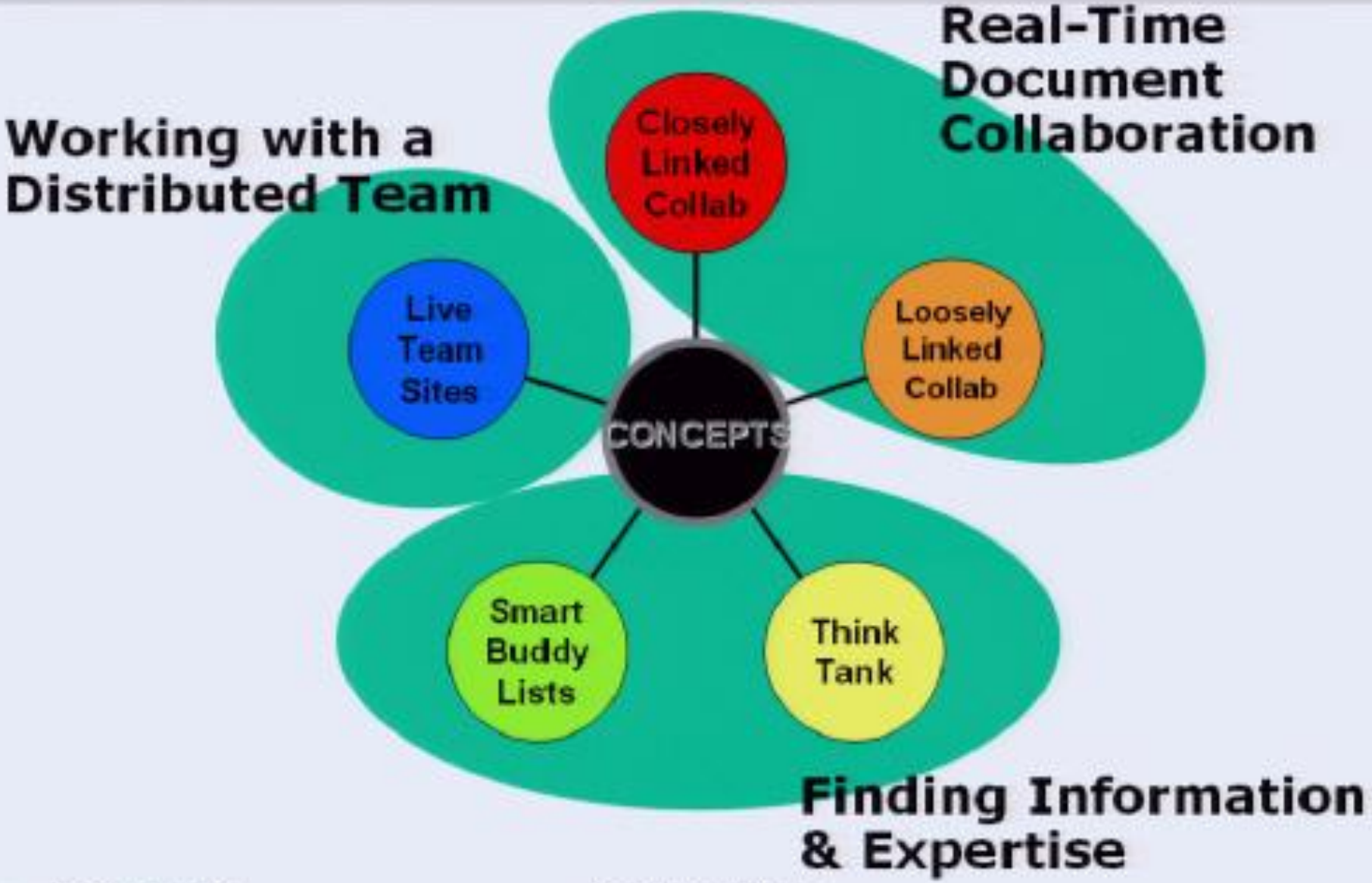
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# CUSTOMER PROBLEMS AND POTENTIAL SOLUTIONS



# *RESULTS OF RESEARCH*

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# WHAT WE HEARD

- Priority of Pain Points
- Relevance of Concepts
- Rating of Capabilities
- Key Benefits
- Key Drawbacks
- Usage Scenarios
- Audience Differentials

# HIGH LEVEL THEMES

- Positive Feedback on RTC Potential
- Even Higher Acceptance for RTC Users
- Critical Mass of Use Impacts Acceptance
- Maintaining Control is Critical
- Size Matters

# OVERALL RANKING OF PAIN POINTS IN PRIORITY ORDER

**Difficult to…**

1. Collaborate and stay in touch with remote team members
2. Find and interact with people or experts inside my company
3. Initiate spontaneous/ad-hoc meetings
4. Work together with others on the same content or document
5. Setup and/or initiate a collaborative session
6. Smoothly add resources or people to a collaborative session
7. Find and interact with people or experts outside my company

- **However, spread between average ranking for #1-#7 is very small (<1), must consider differentials by audience to draw conclusions**

# PAIN POINT DIFFERENCES EXIST ACROSS AUDIENCE TYPES

- **RTC Users and Non-Users**
  - RTC Users have the most difficulty with the working aspects of collaborating. This includes working on documents, with remote team members and in ad-hoc situations.
  - Non-RTC Users have the greatest difficulty in accessing the resources they need to collaborate, both inside and outside their organization. But are more satisfied with the means for collaboration they currently use once the resources are found.
- **BDMs and IWs**
  - BDMs find more issues with initiating spontaneous meetings and connecting with resources inside their organization.
  - IWs: find a greater challenge in working on documents or collaborating with remote team members.

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# RATINGS OF CONCEPTS ACROSS AUDIENCES

| | Closely Linked | Think Tank | Loosely Linked | Live Team Sites | Smart Buddy Lists |
|---|---|---|---|---|---|
| Overall | 1 | 2 | 3 | 4 | 5 |
| Users (All) | 1 | 2 | 3 | 4 | 5 |
| Users (IWorkers) | 1 | 3 | 2 | 4 | 5 |
| Non-Users (All) | 1 | 3 | N/A | 2 | 4 |
| Non-Users (IWorkers) | 1 | 2 | N/A | 3 | 4 |
| BDMs | 1 | 3 | 2 | 4 | 5 |

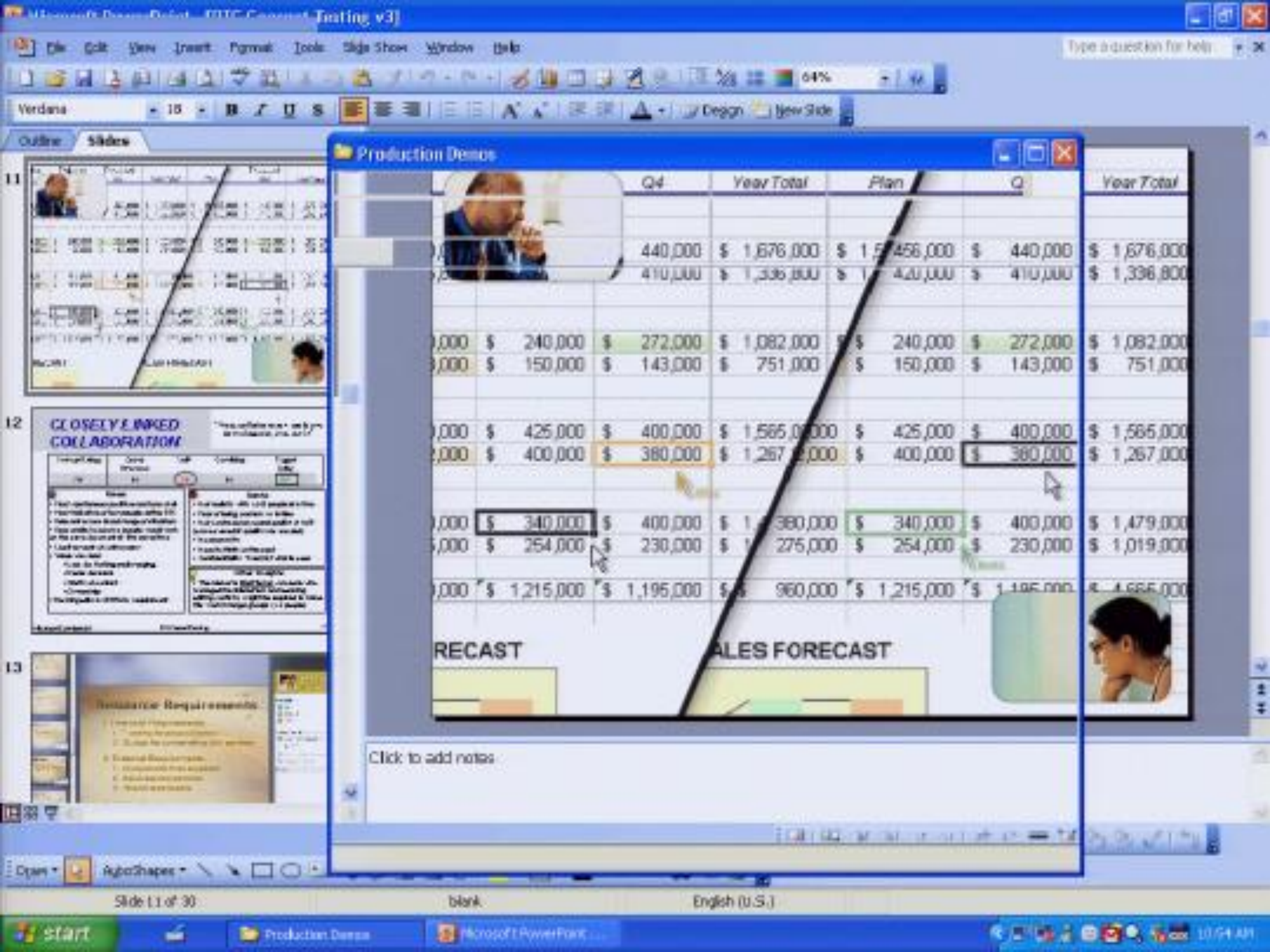


| ted | Projected | Projected Q4 | Year Total | Plan | Projected Q4 | Year Total |
|---|---|---|---|---|---|---|
| | | 440,000 | $ 1,676,000 | $ 1,5 456,000 | $ 440,000 | $ 1,676,000 |
| 6,8 | | 410,000 | $ 1,336,800 | $ 1 420,000 | $ 410,000 | $ 1,336,800 |
| 0,000 | $ 240,000 | $ 272,000 | $ 1,082,000 | $ $ 240,000 | $ 272,000 | $ 1,082,000 |
| 3,000 | $ 150,000 | $ 143,000 | $ 751,000 | $ 150,000 | $ 143,000 | $ 751,000 |
| 0,000 | $ 425,000 | $ 400,000 | $ 1,565,000 | $ 425,000 | $ 400,000 | $ 1,565,000 |
| 2,000 | $ 400,000 | $ 380,000 | $ 1,267,000 | $ 400,000 | $ 380,000 | $ 1,267,000 |
| 0,000 | $ 340,000 | $ 400,000 | $ 1, 380,000 | $ 340,000 | $ 400,000 | $ 1,479,000 |
| 5,000 | $ 254,000 | $ 230,000 | $ 1 275,000 | $ 254,000 | $ 230,000 | $ 1,019,000 |
| 0,000 | $ 1,215,000 | $ 1,195,000 | $ $ 960,000 | $ 1,215,000 | $ 1,195,000 | $ 4,666,000 |

RECAST

ALES FORECAST




Testing v3
Production Demos
Q4
Year Total
Plan
Q
Year Total
CLOSELY LINKED COLLABORATION
RECAST
ALES FORECAST
Click to add notes
Slide 11 of 30
blank
English (U.S.)
start

# Resource Requirements

I Financial Requirements
1. Funding for product launch
2. Budget for co-marketing with partners

II External Requirements
1. Components from suppliers
2. Services from partners
3. Recruit distributors

III Other Requirements
1. Technology depend
2. Personnel requirem

John: June 6, 2004
We should make it clear what other requirements there are, and go into depth a bit more...





Melissa

People
- John
- Chris K
- Alice

Documents
- Business Plan.ppt
  - John
- Revenue Projections
- Marketing Plan

Chat

# CLOSELY LINKED COLLABORATION

"Most collaboration tools are complicated, this isn't!"

| Average Rating | Smart Presence | VoIP | Co-editing | Tagged Edits |
|---|---|---|---|---|
| 5.9 | 6.1 | 5.0 | 6.1 | 6.5 |



**Raves**

- Most spontaneous positive reactions of all
- Most indicative of how people define RTC
- Relevant across broad range of situations
- Reasonable to assume people would work on the same document at the same time
- Least amount of controversy
- Value was clear
  - Less doc forking and merging
  - Faster decisions
  - Clarity of context
  - Ownership
- Tracking edits a CRITICAL requirement



**Rants**

- Not realistic with >3-5 people at a time
- Fear of being overrun w/ invites
- Not convinced on sound quality of VoIP (some swayed if quality was assured)
- No anonymity
- Need to think on the spot
- Confidentiality → restrict what is seen



**Other Insights**

- The idea of a RingMaster, someone who managed the interaction and resolving editing conflicts, might be required to make this work in larger groups (>3 people)

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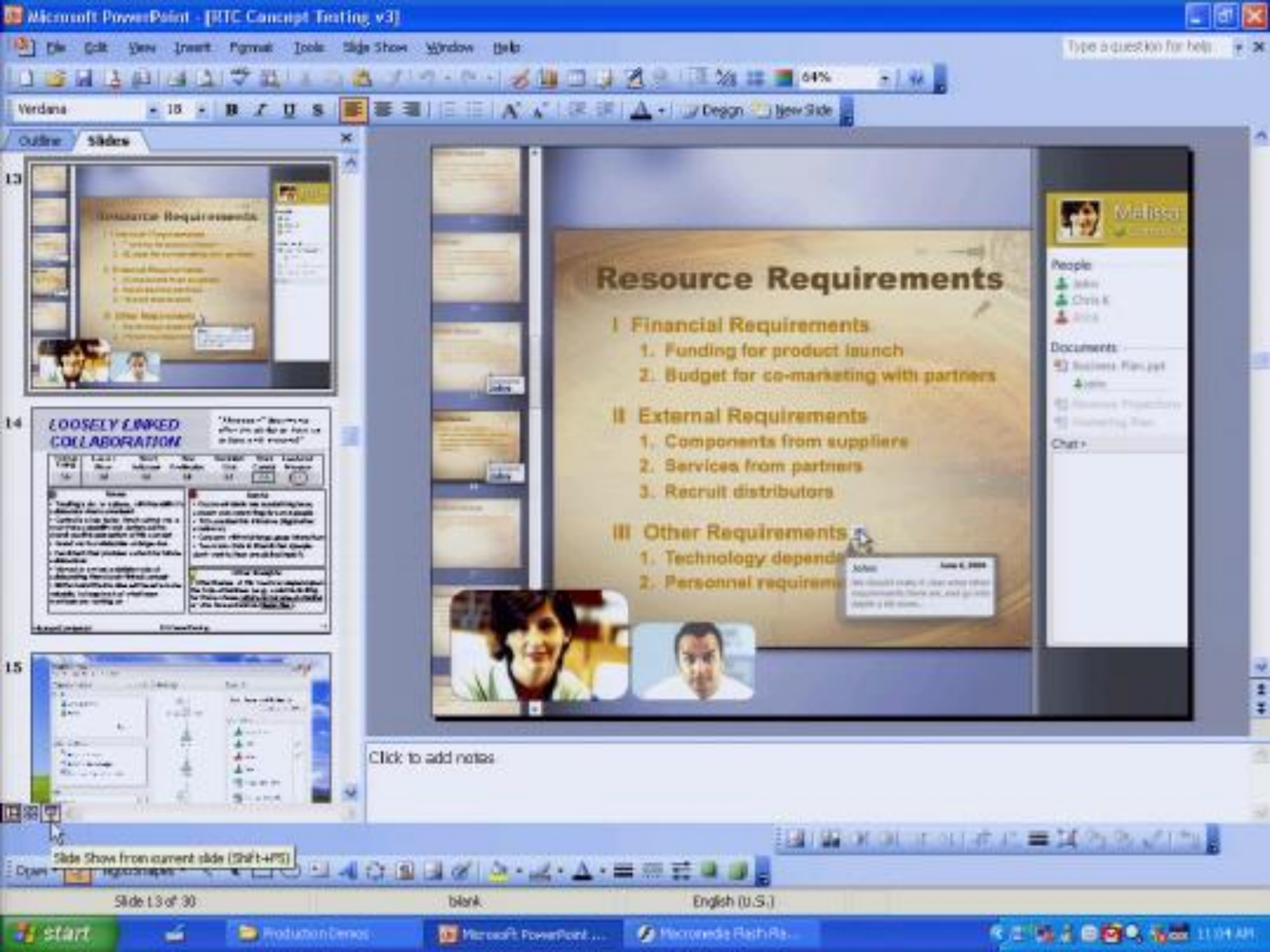


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Microsoft PowerPoint - [RTC Concept Testing v3]
Resource Requirements
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LOOSELY LINKED COLLABORATION
Click to add notes
Slide Show from current slide (Shift+F5)
Slide 13 of 30
blank
English (U.S.)



Closely Linked Concept



**Loosely Linked Concept**



Think Tank Concept



Smart Buddy List Concept



Live Team Sites Concept

Documents and Lists Create Site Settings Help

BUSINESS PLAN REVIEW PORTAL

# Home

ments
red Documents
res
tacts
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eral Discussion
eys

## Announcements

**Business plan review meeting next week!** 6/2/2004
by Melissa Smith (BUS.MANAGEMENT)
Please have all your edits to the document by the end of this week. Thanks

Add new announcement

## Shared Documents

| Type | Name | Modified By |
|---|---|---|
| | Marketing Plan | Melissa Smith (BUS.M |
| | Budget Book | Melissa Smith (BUS.M |
| | Revenue Projections | Melissa Smith (BUS.M |
| | Business Plan | Melissa Smith (BUS.M |

Add new document



Melissa

People
John
Chris K
Alice

Documents
Business Plan.ppt
Revenue Projections
Marketing Plan

Chat

# Resource Requirements

I Financial Requirements
1. Funding for product launch
2. Budget for co-marketing with partners

II External Requirements
1. Components from suppliers
2. Services from partners
3. Recruit distributors

III Anticipated Requirements
1. Technology dependencies
2. Personnel requirements
3. Additional supply channels





Chris K

People
- Melissa
- John
- Stephan

Documents
- Business Plan.ppt
  - Melissa
  - John
- Budget Book

Chat

Melissa Says:
Noticed your comment on slide 16. Any ideas on how to clean up the resource requirements slide?

John Says:
Sure, I've made some notes, but the document is locked for editing.

Melissa Says:
I'll grant you permission to edit the document.

Melissa grants John permission to edit the document

Send

# LOOSELY LINKED COLLABORATION

"Always on" documents offer the ability to keep up to date and prepared"

| Average Rating | Doc as a Place | Visual Indicators | View Redirection | Persistent Chat | Trust Control | Doc-based Presence |
|---|---|---|---|---|---|---|
| 5.6 | 5.8 | 5.5 | 5.8 | 5.3 | 6.6 | 4.4 |



**Raves**

- Treating a doc as a place, with the ability to collaborate when convenient
- Control is a key factor, trust control was a must-have capability and enhanced the overall positive perception of this concept
- Great way to collaborate on large docs
- Persistent Chat provides context for future collaborators
- Viewed as a more scalable mode of collaborating than closely linked concept
- BDMs found the Doc-Based Presence more valuable, to keep track of what team members are working on



**Rants**

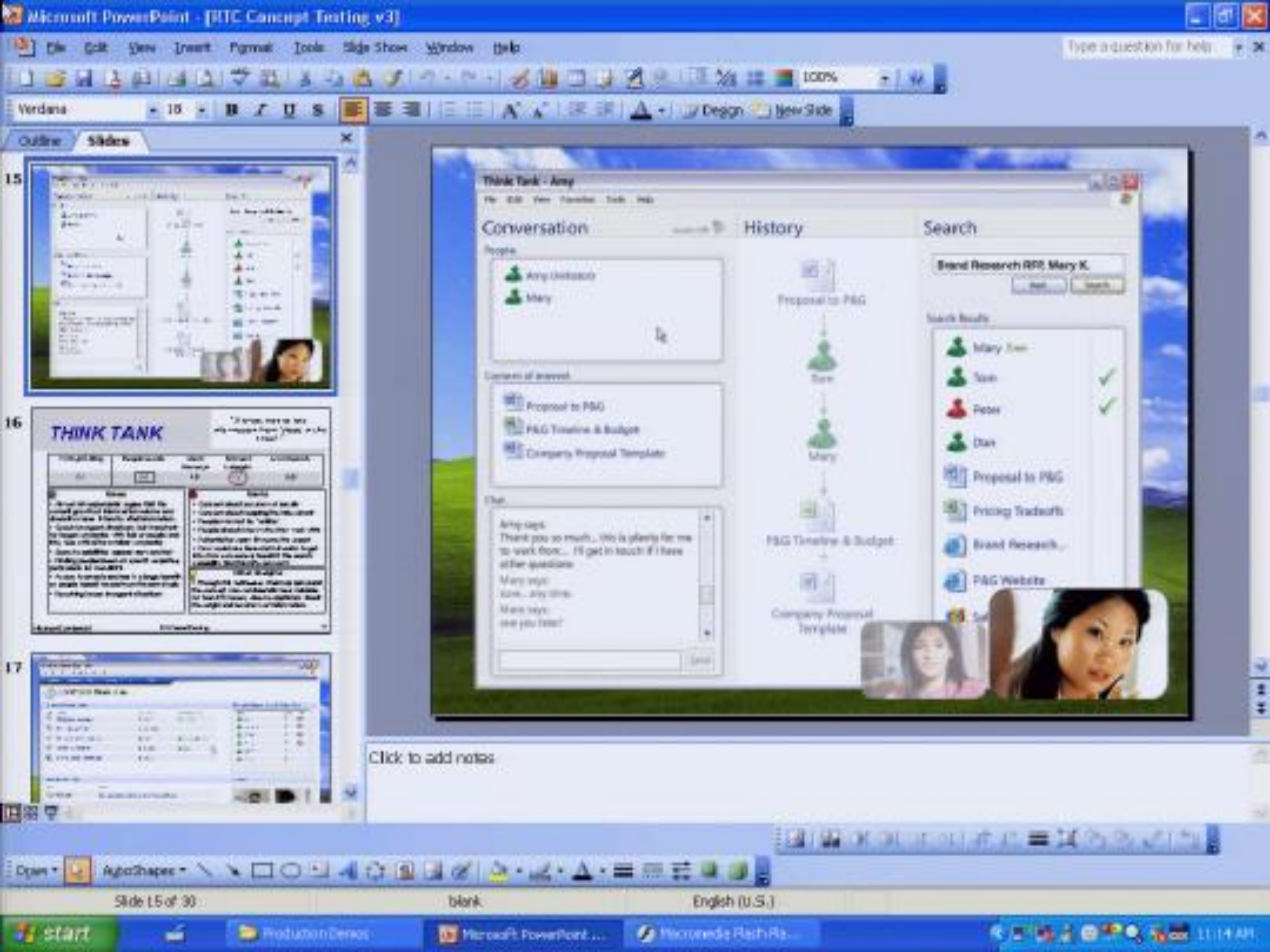
- Document alerts are a polarizing issue, concern over spamming for some people
- IWs consider this intrusive (big brother syndrome)
- Concerns with mid/large group interaction
- Too many chefs in the kitchen (people don't want to hear unsolicited input!)



**Other Insights**

- Effectiveness of this tool may depend upon the type of business (e.g., could be limiting for those whose culture is not one of sharing or who have extensive hierarchies).


Think Tank - Amy
File Edit View Favorites Tools Help
Conversation
Audio Off
People
Amy (Initiator)
Mary
Content of Interest
Proposal to P&G
P&G Timeline & Budget
Company Proposal Template
Chat
Amy says:
Thank you so much... this is plenty for me to work from... I'll get in touch if I have other questions
Mary says:
sure... any time.
Mary says:
see you later!
Send
History
Proposal to P&G
Tom
Mary
P&G Timeline & Budget
Company Proposal Template
Search
Brand Research RFP, Mary K.
Back
Search
Search Results
Mary New
Tom
Peter
Dan
Proposal to P&G
Pricing Tradeoffs
Brand Research...
P&G Website


Microsoft PowerPoint - [RTC Concept Testing v3]
Outline
Slides
15
16
THINK TANK
17
Think Tank - Amy
Conversation
History
Search
Click to add notes
Slide 15 of 30
blank
English (U.S.)
start



# THINK TANK

"A great way to get information from 'those in the know' "

| Average Rating | People Search | Smart Presence | Personal Networks | Saved Search |
|---|---|---|---|---|
| 5.4 | 6.0 | 4.9 | 4.8 | 5.9 |

## Raves

- Almost all respondents agree that the current growth of information volume and diversity makes it hard to find information.
- Great for urgent situations, but important for larger companies with lots of people and info, less critical for smaller companies
- Search capabilities appear easy and fast
- Finding people based on specific expertise, particularly for non-BDMs
- Access to saved searches is a large benefit, as people repeat research on the same topic
- Resolving issues in urgent situations

## Rants

- Concern about accuracy of results
- Concern about keeping the info current
- People may not be "online"
- People already know who they work with
- Potential for spam if you're the expert
- Few would use Personal Networks to get info from someone (shouldn't the search capability find this info anyway?)

## Other Insights

- Though this addresses their top pain point, the concept was considerably less valuable for Non-RTC Users, due to skepticism about the origin and accuracy of information.

Contoso Live Team Site

File Edit View Favorites Tools Help

Home Documents and Lists Create Site Settings Help

# CONTOSO Team Site

## Shared Documents

| Type | Name | Created By | Currently Edited By |
|---|---|---|---|
| | Product Launch | David | David |
| | Business Plan | Melissa | - |
| | Revenue Projections | Bob | Andy, Joe |
| | Sales Forecast | Salah | Salah |
| | Projected Revenue | Alice | - |

## People Currently Visiting Site

| Status | Audio | Video |
|---|---|---|
| Joe | | |
| Lauren | | |
| David | | |
| Andy | | |
| Salah | | |
| Alice | | |

## Recent Activity

| Time | Name |
|---|---|
| 7/27 4:55pm | Bob uploaded Revenue Projections |
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## Video


Andy


Lauren


Joe


David



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# LIVE TEAM SITES

"Live Team Sites help you know who is contributing, adding a human touch"

| Average Rating | Over-the-Shoulder VoIP | Site-specific Presence | Video Presence | Live Alerts | Document Collaboration |
|---|---|---|---|---|---|
| 5.3 | 5.5 | 5.7 | 4.0 | 5.4 | 6.1 |



**Raves**

- Those who work in teams or on ongoing projects reacted very favorably and would use the product
- Document collaboration was often seen as the main point of real time collaboration (see who is doing what & initiating a meeting)
- Site-specific presence is great for putting voices with names
- Tracking options allow managers and team leaders to be informed and in control
- Non-RTC User IWs gave slightly higher ratings across all features, citing benefits to team organization and project mgmt



**Rant**

- Doesn't address issues with time-zones
- Skepticism over quality of A/V
- While video was a positive for some telecommuters, most considered it a nuisance or were concerned about privacy
- Persistent audio considered invasive, though useful in certain cases
- Live alerts considered interruptive



**Other Insights**

- Live team sites will be used more heavily in the context of a task or project centric purpose, and the ability to track related project materials (minutes, tasks, etc.)

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# Mutual Fund Investment Recommendations

Mutual funds are a great way to gain exposure to a broad range of asset classes. At Contoso, we offer investment products that select fund categories most likely to outperform the broader market. Furthermore, by investing in a basket of funds, we help to minimize risk.

Key Criteria:

- Hold for long term (>5 years)
- Focused on large-cap and mid-cap stocks
- Less volatile than the broad market (S&P 500)
- Low expense ratio (<2%)

Recommended Funds (equal allocation across)





Susan
ContosoCorp

Mutual Funds (External)
- Trey Research (Auto-Reply)
- Invest With Us (Auto-Reply)
- Large Cap World (Auto-Reply)

Internal Experts
- Mutual Fund Analysts (2/3)
- Bond Experts (3/3)
- Analysts (2/4)
- Sales Professionals (4/5)

Contacts

Contoso Clients

Chat

To: Trey Research

Trey Research Auto-Reply:
3 funds available:
Trey Large Cap Opportunities
Trey Large Cap Global
Trey Balanced Growth
Chat with a
Sales Representative
for more information.

Send



Closely Linked Concept



Loosely Linked Concept



Think Tank Concept



Smart Buddy List Concept



**Live Team Sites Concept**


Smart Buddy List Concept



# SMART BUDDY LISTS

"Concerns regarding the accuracy, relevancy, and integrity of resources could limit use"

| Average Rating | Internal Experts | External Experts | Auto Reply Buddies | Dynamic Buddy Lists | Communities of Interest |
|---|---|---|---|---|---|
| 5.0 | 5.4 | 5.3 | 4.1 | 5.3 | 4.8 |



**Raves**

- Very relevant for those creating documents for external consumption (proposals, etc.) or with a lot of external information
- Clear value in terms of saved time and enhanced productivity
- Great for urgent situations
- BDMs found the concept significantly more valuable than IWs



**Other Insights**

- Experts need an incentive to be found, or they will "hide" and the value of the network will degrade. This incentive mechanism must be apparent enough to promote use.



**Rants**

- Most features polarizing for respondents
- Concerns about accuracy
- Potential for uncovering information you should have
- Effort required to keep current
- Shouldn't people do their own work?
- Tool is complex/confusing
- Communities of interest could make it easier to spam
- Info from a BOT may lack req'd depth
- Surprisingly, Non-RTC Users ranked this concept lower, even though it addresses their top pain points!

# OPPORTUNITIES & CHALLENGES

- **Clear value propositions**.....people see the **benefits** in Real-Time Collaboration technologies
  - Particularly with better **document collaboration** (through drag & drop, co-editing, etc.) and **finding people/expertise**
- **Contingencies exist** as precursors to broader adoption, features that are more "control/tracking" features are as important as the real-time collaboration features themselves
  - **Critical Mass, Control, Security, Accuracy**
- **Asymmetries exist** across audiences, both in terms of decision making authority (BDM vs IW) as well as familiarity with RTC technologies
  - Cultural Barriers
  - Pain Points and Motivations

# THANK YOU!!!!

Watch Them Yourself:

\\rtcplanning\public\RTC Concepts

More Research Available

http://office/sites/Planning/rtc/concepts/